

Add a Client



- ✓ Check Client List
- ✓ Create Client Profile
- ✓ Add Alternate Name
- ✓ Add Address
- ✓ Add Additional Info
- ✓ Add Collateral Contacts
- ✓ Add Other Numbers
- ✓ Intake

Add Client

Check Client List

1. Navigate to **Client List**: Select the **Client List** menu item.
2. Initially the **Client List** will not show any clients. If you click **Go** without entering any search criteria the **Client List** will show all clients for the Agency if that number is less than 1,000. If your agency has more than 1,000 clients, you will be directed to select search criteria.
3. If you enter any search criteria and then click **Go** the **Client List** will show clients based on the search criteria you entered.
4. Note that the **Facility** field in the **Client Search** portion of the screen defaults to blank. Choosing a facility in the Facility drop down and clicking Go will yield only clients associated with that facility.

WITS I-SMART User: Cleland, Lonnie
Loc: Iowa Dept. of Public Health, Test Facility
Client:

October 2011

Print View

Home Page
Agency
Group List
Client List
Client Profile
Linked Consents
Non-Episode Contact
Activity List
Episode List

Client Search

Agency: Iowa Dept. of Public Health
First Name:
Last Name:
SSN:
DOB:
Client ID:
Provider Client ID:
Treatment Staff:
Primary Care Staff:
Case Status: All Clients
Intake Staff:

Go
Add Client

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Client Search

Agency: Iowa Dept. of Public Health
First Name:
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Client ID:
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Treatment Staff:
Primary Care Staff:
Case Status: All Clients
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Go
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Print View

Home Page
Agency
Group List
Client List
Client Profile
Linked Consents
Non-Episode Contact
Activity List
Episode List
System Administration
My Settings
Reports
Support Ticket

Client Search

Agency: Iowa Dept. of Public Health
First Name:
Last Name:
SSN:
DOB:
Client ID:
Provider Client ID:
Treatment Staff:
Primary Care Staff:
Case Status: All Clients
Intake Staff:
Other Number:
Number Type:
Include Only Active Consents: Yes

Clear Go
Add Client

Client List (Export)

Client ID	Full Name	DOB	SSN	Gender	Actions
6711036754	2011, September	11/3/1967	6754	Male	Profile Activity List Linked Consents
7609061638	Address, Test	9/6/1976	999-09-1638	Male	Profile Activity List Linked Consents
1111118856	Agam, Test	11/11/1933	342-66-6856	Male	Profile Activity List Linked Consents
8711023434	Agam, Testing	11/2/1967	565-87-3434	Female	Profile Activity List Linked Consents
8510100695	August, 2006	10/10/1985	485-78-0695	Female	Profile Activity List Linked Consents
5603159197	Beatie, VIII	3/15/1956	999-23-9197	Male	Profile Activity List Linked Consents
5603159999	Beatie, VIII	3/15/1956	999-99-9999	Male	Profile Activity List Linked Consents
6711014532	Client, Update	11/1/1967	999-09-4532	Male	Profile Activity List Linked Consents
651014532	Client, Update	11/1/1967	999-09-4532	Male	Profile Activity List Linked Consents

Add Client

Check Client List

- Check Client List:** Before adding a client to I-SMART, you must first check to see if they have already been added to the system by another user. Scan the list for their name or use the **Search** feature.
- To search by **First Name**, **Last Name**, **SSN**, **DOB**, **Client ID**, or **Provider Client ID** type the information into the appropriate field and click **Go**
- To search by **Case Status**, **Staff**, or **Facility** select the **Case Status**, **Staff** name, or **Facility** from the drop down list and click **Go**.
- You can search using partial information by using the *. For example, if you want to find all clients whose last name begins with Bea type Bea* into the **Last Name** field and click **Go**. The list will only show clients with a last name beginning with "SM".
- Selecting **All Clients** in the **Case Status** Field will ensure both active and closed records are checked.
- If the client is not listed, proceed to **Add Client**. If the client is listed, click on **Profile** to be sure that it is in fact the same client. If it is the same client then you do not need to add the client to the system. Only one client profile exists per agency in the system. Click **Activity List** to see the **Episode List**. Use the **Start New Episode** hyperlink to open a new case at the current facility.

The screenshots illustrate the I-SMART interface for checking and adding clients. The top screenshot shows the 'Client Search' form with fields for Agency, First Name, Last Name, SSN, Client ID, Treatment Staff, Case Status, Other Number, Facility, Last Name, DOB, Provider Client ID, Primary Care Staff, Intake Staff, and Number Type. A 'Go' button is at the bottom right. The middle screenshot shows the 'Client List (Export)' table with columns for Client ID, Full Name, DOB, SSN, Gender, and Actions. The bottom screenshot shows the 'Episode List for Beatie, Will' table with columns for Case #, Status, Facility, Intake By, Intake Date, Closed Date, Latest PE, Treatment Domain, and Actions. A red circle highlights the 'Start New Episode' link in the top right corner of the Episode List table.



Add Client

Create Client Profile

12. **Entry Steps:** Check Client List
 13. **Add Client:** You have already determined that the client has never been to any Facility within your agency. Click the **Add Client** hyperlink in the Client List portion of the screen.
 14. **Client Profile:** Some fields in the **Client Profile** are required. These fields will be highlighted in yellow.
- Note: SS#:
- If the client has no SS# or if it is unknown the user can create a number by using the format 999-00-0001, 999-00-0002, etc. The agency will have to keep track of SS#'s it creates just as was done with SARS.
 - The user can also enter just the client's last 4 SS3 digits.

12. After completing the upper portion of the screen, click **Save**. You are now ready to add **Alternate Names** or **Addresses**. Using the Next arrow will move the user to the Alternate Names screen.

Note: All system-required fields are highlighted in yellow. Fields required for state reporting are highlighted in a softer yellow.

Client Search

No results match your search criteria.

Agency: Iowa Dept. of Public Health | Facility: [Dropdown]

First Name: [Text] | Last Name: Bunkley

SSN: [Text] | DOB: [Text]

Client ID: [Text] | Provider Client ID: [Text]

Treatment Staff: [Dropdown] | Primary Care Staff: [Text]

Case Status: All Clients | Intake Staff: [Text]

Other Number: [Text] | Number Type: [Dropdown]

Include Only Active Consents: Yes [Dropdown]

[Clear] [Go]

Client Profile for Client, Testing

First Name: Testing | Provider Client ID: [Text]

Middle Name: [Text] | I-SMART ID: 6711049867

Last Name: Client | Record Created By: Cleland, Lonnie

Gender: 2-Female | Last Updated By: Cleland, Lonnie

DOB: 11/4/1967 | Created Date: 9/5/2008 8:10 AM

SSN: 999-00-9867 | Last Updated Date: 10/27/2009 8:29 AM

Driver's License: [Text] [Dropdown]

Ethnicity: 1-Puerto Rican | Selected Races: 1-Caucasian, 2-Black/African American, 3-American Indian

Races: 4-Asian, 5-Hawaiian or Pacific Islander, 6-Alaskan Native, 10-Unknown, 11-Not Collected

[Cancel] [Save] [Finish]

Alternate Names			
Last Name	First Name	Middle Name	Actions

Addresses					
Address Type	Address	Confidential	Created	Updated	Actions
	1234				

Add Client

Add Alternate Name

- When you have completed the **Client Profile** screen, click **Next**. You will launch the **Alternate Name** screen. Click the **Add Alternate Name** hyperlink.
- Enter any other names the client uses. Collect as many names as you can to ensure they are not entered in the system under another name in the future.
- If you wish to add multiple **Alternate Names**, Click **Save** to store the name in the **Alternate Name** table at the top of the screen. The fields in the bottom portion of the screen will gray out, and you will see the name stored in the table. You must click **Add Alternate Name** for each new entry. When you have entered the last **Alternate Name** entry, click **Save** then **Next**.
- Edits:** You may use the **Review** and **Delete** hyperlinks in the **Actions** column to edit any **Saved** entries.

Note: Clicking on **Next** automatically saves the information and moves you to the Additional Information screen.

The screenshots show the 'Alternate Names' screen in the WITS I-SMART system. The top header shows the user 'Cleland, Lonnie' and the client 'Client, Testing | 6711049867'. The left sidebar contains navigation links: Home Page, Agency, Group List, Client List, Client Profile, Alternate Names (selected), Additional Information, Contact Info, Collateral Contacts, Other Numbers, History, Allergies, Linked Consents, Non-Episode Contact, and Activity List.

The main content area features a table titled 'Alternate Names' with columns: Last Name, First Name, Middle Name, and Actions. Below the table are input fields for First Name, Middle Name, and Last Name, along with 'Cancel', 'Save', and 'Finish' buttons.

The first screenshot shows the initial state with empty fields. The second screenshot shows the 'Add Alternate Name' button being clicked. The third screenshot shows the 'Alternate Names' table populated with a new entry: 'Bunkley' in the First Name column. The 'Actions' column for this entry contains 'Review | Delete' links.

Add Client

Add Additional Info

25. Entry Points: Click on the **Next** button in the **Contact Info** screen or click on the **Additional Information** sub-menu.
26. Using your mouse, click on your selection in the mover box. You may hold the Ctrl key down and either drag the mouse or click on separate choices to make multiple selections at the same time. When you select the item, its background will turn dark.
27. Click on the right pointing arrow located between the mover box to move your selections to the **Selected** box to the right. Your selections will be moved to the **Selected** box.
28. To remove a selection from the **Selected** box, click on the items you want to move and use the left pointing arrow located between the mover boxes. Your selections will be moved back to the original list box on the left.
29. Use your mouse to select values in the drop down boxes such as Ethnicity. Drop down boxes are designed to allow only one response in the fields.
30. When you have made all your selections, click **Next**. **Next** launches the **Contact Info** Screen.

The screenshots show the 'Additional Information' screen in the WITS I-SMART application. The top screenshot shows the initial state where the 'Special Needs' list on the left contains 'Developmentally Disabled', 'Major Difficulty in Ambulating or Nonambulation', 'Moderate To Severe Medical Problems', and 'No Response'. The 'Selected Special Needs' list on the right is empty. The bottom screenshot shows the same screen after several selections have been moved to the 'Selected Special Needs' box, including 'Developmentally Disabled', 'Major Difficulty in Ambulating or Nonambulation', and 'Organically Based Problem'. The 'Special Needs' list now contains 'Moderate To Severe Medical Problems', 'No Response', and 'None'. The 'General Client Comments' field is visible at the bottom of both screenshots.

Add Client

Add Addresses

20. Click on the **Contact Info** menu item, or click **Next** in the **Alternate Name** screen.
21. **Phone Numbers:** Add phone numbers as appropriate to the top of the screen. You may erase phone numbers using the backspace key.
22. **Addresses:** Click the **Add Address** hyperlink which will take you to a new screen for entering the information. Add an address. Click on **Finish** when you are done entering the information. This will take you back to the **Contact Info** screen with the address you just entered saved under **Addresses**.
23. Click on **Add Address** to enter each new address.
24. Click **Finish** to add each new address to the Address List.

Next at the Contact Info screen launches the Collateral Contacts screen.

The top screenshot shows the 'Contact Info' screen. The left sidebar contains a menu with items: Home Page, Agency, Group List, Client List, Client Profile (selected), Alternate Names, Additional Information, Contact Info, Collateral Contacts, Other Numbers, History, Allergies, Linked Consents, Non-Episode Contact, Activity List, Episode List, System Administration, My Settings, Reports, and Support Ticket. The main content area has a 'Contact Info' header and fields for Home Phone # (000) 000-0000, Work Phone #, Mobile #, Other Phone #, Fax #, and Email Address. It also shows 'Created 9/5/2008 8:10 AM' and 'Updated 12/6/2011 12:49 PM'. Below these fields is an 'Addresses' table with columns: Address Type, Address, Confidential, Created, Updated, and Actions. The table contains one row for 'Client Mailing' with address '1234 Des Moines, IA 54545'. At the bottom right are buttons for 'Cancel', 'Save', 'Finish', and navigation arrows.

The bottom screenshot shows the 'Add Address' screen. The left sidebar is identical to the top screenshot. The main content area has an 'Add Address' header and fields for Address Type (Client Mailing), Address Line 1 (1234), Address Line 2, City (Des Moines), State (IA), and Zip (54545). It also has a 'Confidential' dropdown set to 'No'. At the bottom right are buttons for 'Cancel' and 'Finish'.

Add Client

Add Collateral Contacts

31. Click the **Add Contact** hyperlink to insert contact data. This is the place where you can document the details about all people associated with the client outside the agency.
32. The **Can Contact** field asks the client if the provider can contact this person for any reason.
33. If you need a signed consent to be able to contact this person, complete the consent in the consent module and then select **Yes** on this screen for the **Consent On File** field.
34. When you have made all your entries for a contact, click **Save** to store them in the table.
35. When you have saved all contacts, click **Finish** to return to the **Client List** screen.
36. Review the information in the **Client Profile** screen. If correct, Click **Finish** to return to **Client List** where you will see your new entry listed alphabetically in the **Client List**. Or you can proceed to do the Intake from the **Client List** screen by clicking on the **Activity List** menu item.

The image displays two screenshots of the WITS I-SMART 'Collateral Contacts' form. The top screenshot shows the table view with columns: First Name, Last Name, Relation, Phone Numbers, Can Contact?, and Actions. A red arrow points from the 'Add Contact' button in the bottom right corner of the table to the 'Add Contact' button in the bottom right corner of the form view. The bottom screenshot shows the form view with fields for First Name, Last Name, Relation, Phone Numbers, Can Contact?, and Consent On File. The 'Can Contact?' field is set to 'Yes' and the 'Consent On File' field is set to 'No'. The 'Notes' field is a large text area. The 'Created' and 'Last Update' fields are at the bottom right. The 'Cancel', 'Save', and 'Finish' buttons are at the bottom right.

Add Client

Other Numbers

37. Click the **Add Other Number** hyperlink to insert court case numbers and related numbers.
38. **Number Type** and **Number**: Select the number type from the drop down list and enter the appropriate number.
39. Enter other information as needed.
40. Click **Save** to move the information you just entered to the list on top.
41. Click on **Add Other Number** for each new entry. You can save multiple numbers for a client.

WITS I-SMART User: Cleland, Lonnie
Loc: Iowa Dept. of Public Health, Test Facility
Client: Client, Testing | 6711049867

October 2011

Print Report Print View Logout

Home Page
Agency ▶
Group List ▶
Client List ▼
Client Profile ▼
Alternate Names
Additional Information
Contact Info
Collateral Contacts
Other Numbers
History
Allergies
Linked Consents
Non-Episode Contact
Activity List ▶
Episode List

Other Numbers

Number Type	#	Start	End	Contact Name	Status	Actions

Number Type
Number
Start Date
End Date

[Add Other Number](#)

WITS I-SMART User: Cleland, Lonnie
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October 2011

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Agency ▶
Group List ▶
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Alternate Names
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Linked Consents
Non-Episode Contact
Activity List ▶
Episode List
System Administration ▶
My Settings ▶
Reports
Support Ticket

Other Numbers

Number Type	#	Start	End	Contact Name	Status	Actions

Number Type **Court Case Number**
Number **234567**
Start Date **12/6/2011**
End Date
Status **Active**
Contact [Add Contact](#)
Comments

[Add Other Number](#)

[Cancel](#) [Save](#) [Finish](#)

Add Client

Intake

42. Entry Steps: **Client Profile**
43. Once **Client Profile** is complete, you are ready to **Intake** the client. **Intake** is the beginning of a new treatment episode and is required to be completed before any other clinical activities can be recorded.
44. **Intake** can only be completed if the client has no record at the facility, or all previous cases have been closed. When you click on the client's **Activity List** hyperlink, you will get a message window indicating the case status for the client.
45. Click on the **Start New Episode** link to do a new intake and thus, start a new episode. This will take you to the **Client Intake** screen.
46. Check the information in the top portion of the screen which comes pre-filled, and edit if appropriate. Select appropriate options from the drop-down fields. Type in the details of the **Presenting Problems**.
47. Complete the remaining sections if applicable.
48. Click **Finish**. **Finish** will take you to the client's **Activity List** screen. You have now opened a case for the client.

The screenshots show the WITS SMART software interface. The first screenshot shows the 'Client Search' screen with various filters and a table of clients. The second screenshot shows the 'Episode List for Client, EFR' screen with a table of episodes. The third screenshot shows the 'Intake Case Information for Client, Testing' screen with various fields for client information, intake details, and special initiatives.

Note: For clients who do not go through only the assessment/Placement Screening process and do not need a discharge record you can close the case on this screen. To close the case, enter a date in the **Date Closed** field and click the **Save & Close the Case** hyperlink.

Add Client

Intake

49. Verify **Client Profile** and **Intake** activities are complete in the **Episode Activity List** screen.
50. You may continue with another activity using the left menu to start another task.
51. The **Activity List** shows all the clinical activities started or completed for a client.
52. Notice the **(Details)** hyperlink next to the In Progress Status note. Clicking this hyperlink will open a window showing what state-required information has been left undone. To complete the required information simple click the appropriate **Review** link and go to the screen where the information resides. In this case, you would go to Client Profile/Contact Info/**Add Address**.

Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	12/5/2011	9/12/2011	In Progress (Details)	Review
TAP Assessment (Intake)	12/5/2011	12/5/2011	In Progress (Details)	Review
Intake Transaction	12/5/2011	12/5/2011	Completed	Review
Crisis Intervention	12/5/2011	12/5/2011	In Progress (Details)	Review
Placement Screening	12/5/2011	12/5/2011	In Progress (Details)	Review

